

Reports/Admin Brainstorming Roundtable
Evergreen Indiana Annual Meeting and Conference
May 11, 2010

Christine Sterle, Thorntown Public Library, presented "Inventory Using Evergreen Indiana." The handout and related reports presented the specific procedures used by the Thorntown Public Library, including best practices and lessons learned.

Questions/Issues Raised:

- Could the State Library provide barcode scanners, programmed for Evergreen, to be rotated through the consortium for inventories?
 - Answer: The State Library cannot provide these, but the consortium may want to consider this as a group purchase.
- There should be a searchable database of policy and procedure updates, as well as a searchable database for the updates.
 - Recommendation: A blog for the weekly updates could serve this purpose.
- The report from Equinox that gives a current count of patrons, "Count Patrons by Permission Group" does not filter out inactive or deleted patrons. (Note: Deleted patrons are those records that have been merged into another patron record.)
 - Mike Peters created a new report, also in the Shared Folders→admin→General Report Templates (from Equinox) (EG-IN)→ Library Patrons (EG-IN), called "Count Patrons by Permission Group (filters deleted/inactive)"

Discussed items with notes for further review:

Item for the Consortium to consider:

- A status of "Storage" would be helpful to add. This would need to be considered by the Executive Committee.

Items to be considered for development:

- The reports should be editable.
- There should be a way to sort templates and outputs, or at least display the ID number of the template in the lists.
- There should be a way to add occurrences of a report after it runs correctly the first time.